The Triumvirate: Effective Communication Across Publisher, Library, and Discovery Channels

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Abstract:

In examining data transfer challenges from both librarian and publisher perspectives, this article based on a NC Serials Conference presentation calls for proactive industry communication across publisher, library, and discovery service channels. The authors discuss the importance of collaborative communication across the industry.

Keywords: communication | libraries | publishers | troubleshooting | vendors

Article:

The importance of collaborative communication from a publisher perspective

In their 2019 NC Serials presentation, Bernhardt and Wickes discuss the importance of collaborative communication across the industry. Wickes started the presentation and identified several key themes, including collaboration, communication, industry standards, and takeaways. Leading with the theme of collaboration, Wickes noted that collaborative communication is an ideal state but not necessarily the norm, and she noted the frustration librarians can experience when forced into the position of facilitating troubleshooting conversations between publishers and discovery services. Publishers and discovery services should proactively handle this communication. Libraries, publishers, and discovery services should all work as a team to ensure that citation linking is working, knowledgebases are accurate and up to date, and all content is discoverable and accessible from wherever the user comes into the discovery environment.

With this in mind, a rising trend in the publishing industry is hiring staff resources devoted to content discovery management. Oxford University Press (OUP) is one of many publishers, including Wiley, Cambridge University Press, Gale, Duke University Press, Springer, IEEE, Bloomsbury, and Emerald, who have invested in individuals or teams devoted to supporting industry standards, solving linking issues, and communicating with discovery and indexing partners. Wickes also discussed the collaborative nature of these roles; many content discovery management workers have collaborated in working groups, presented on panels together, and cited one another's work. There is an active Google group for sharing industry questions, helpful articles, trends, contacts, and techniques.

Wickes also noted that an important facet of communication is understanding what's being said. Industry lexicon and jargon can be difficult to parse; for example, when publishers use the word "work" to describe a piece of content, they are unlikely to be talking about Functional Requirements for Bibliographic Records (FRBR). A big part of facilitating communication is translating questions coming from libraries to discovery services and publishers. The high-level technical terminology, the growing number of products and functions and mergers, and the different metadata that make these products work together can make problems very difficult to unpack. One way to make collaboration across the industry much easier is by supporting industry standards. Industry standards are a common language. Wickes noted the importance of industry collaboration in developing these standards and recommended practices, in particular National Information Standards Organization's (NISO) Open Discovery Initiative and Knowledge Bases and Related Tools (KBART) recommended practice.

When libraries, publishers, and discovery services find themselves in the position of collaborative troubleshooting, Wickes offered some tips and takeaways for making this process a little easier. The first is deceptively simple—when libraries are experiencing an access issue, they should always start by opening a ticket with the discovery vendor. Opening a ticket may sound like pointless advice, but the noteworthy takeaway is *where* libraries open a ticket. The discovery vendor is the broadest faction and the point of entry, so starting the troubleshooting process here allows discovery services to check if the problem is systemic. Additionally, by starting the investigation process with the discovery service, libraries can then bring that ticket number to the publisher who will have a specific case to raise, which speeds up the investigation.

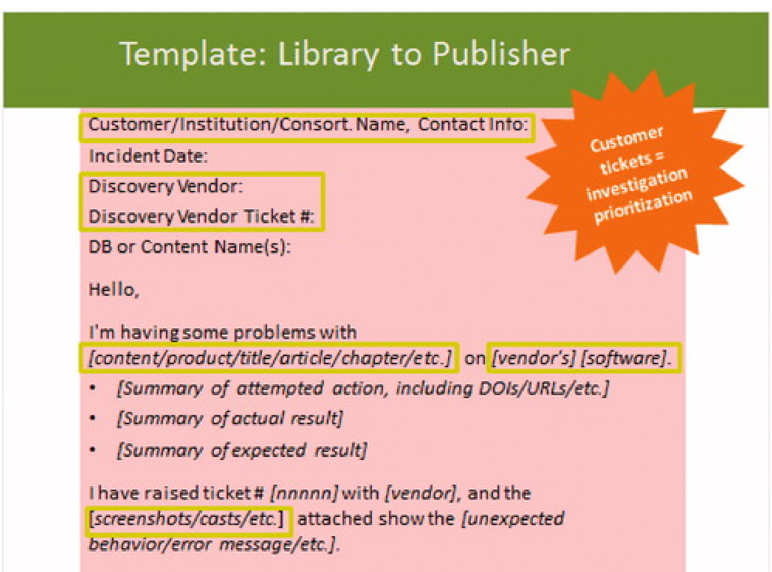

Figure 1. Template from library to publisher after a ticket has been submitted to the discovery service vendor.

With input from colleagues in content discovery management across many different publishers, Wickes also provided a template for raising access issues to publishers *after* a ticket has been raised with the discovery service vendor (see Figure 1). The crucial pieces of information include:

- Name of the institution/consortia with access—this lets publishers check access credentials, which is one of many points where things can break.
- Discovery Vendor ticket number—this is the starting point for publishers to begin collaborating with contacts at the discovery vendor.
- Description of content and where the problem occurred—this helps publishers troubleshoot which of the many points in the data workflow might be causing problems.
- The name of the discovery vendor and the particular software—again, it can be difficult to parse when company names, product names, and even old product names are used interchangeably.
- Screenshots and screencasts are also immensely helpful.

Wrapping up the publisher side of the conversation, Wickes closed with an emphasis on the importance of collaboration across the industry, which can take many forms:

- Pan-industry conversation
    - When publishers, discovery vendors, and librarians are all part of the conversation, collaborating in working groups, following the same listservs, we understand, communicate, and build better things.
- Investing in content discovery management
    - When publishers and discovery vendors invest in resources devoted to adhering to industry standards and cultivating and maintaining relationships, things work better.
- Collaborative investigation at point of problem, from the start
    - When publishers and discovery vendors can troubleshoot together from the beginning, problems are solved faster. Librarians should bring both parties into the conversation, starting with a ticket to the discovery service.
- Recognizing complexity
    - Every part of this industry has different jargon. Communicating as clearly as possible and double-checking understanding is incredibly important.
- The worst practice is blaming the other party without taking steps to try to understand the problem, and this is applicable across the industry.
    - Content discovery and access problems are complex and can be tricky to investigate. It is frustrating to wait for an answer, but blaming the other party without trying to problem solve collaboratively will not solve anything.

The challenges librarians face

Bernhardt began by talking about different challenges that librarians face when working with knowledgebase metadata. Some of the challenges addressed were collections not being available, incorrect holdings in collections, no direct contact person, and having different file types. Many times, librarians find out that the collection they acquired is not available in their knowledgebase. When this occurs, the librarian has to request that the collection be added to the knowledgebase or add it themselves. Requesting a collection can take weeks for setup with many emails going back and forth with the vendor. Another common issue is incorrect holdings in the collection that is available. When this occurs, the library often has to create a separate collection that reflects their holdings information.

When holdings issues arise, sometimes there is not a direct person to contact at the publisher or discovery service. When library staff only has the option to contact the vendor through a generic email such as "Help," they worry about whether or not the vendor will respond. Different file types required is another issue that librarians deal with. Some publishers/vendors only have Machine Readable Cataloging (MARC) records, others just spreadsheets, and others just KBART files; librarians have to work with each type that is given to them. Bernhardt stated that in all these issues metadata is key. Making sure metadata feeds are correct will help the librarian make sure their patrons can discover and access all the resources easily.

Bernhardt also gave a few examples of issues when working with a discovery service and a publisher/vendor. Many times, these issues relate to metadata and miscommunication. Bernhardt stated that finding the right people to talk to from different companies can be difficult. Once you find the right people, understanding each other's viewpoints and issues is essential.

Tracking communication and resolution when troubleshooting can be difficult, especially if you have several different issues going on at the same time. Bernhardt gave details on several freely available tools to help in this process. The first tool mentioned is Trello (https://trello.com). Trello is a free product that provides ways to organize projects and assign tasks that many libraries use to track issues. Another tool that Bernhardt recommended is Screencastify (https://www.screencastify.com). This is a Chrome extension that allows the user to capture and record images from the computer screen. This can be used to send a recording of the issue to the discovery services or publishers/vendors.

Discussion and summary

In addition to the challenges identified by the authors, the audience raised additional issues in content discovery management. These included how frustrating it can be to try to troubleshoot discovery and access issues outside of typical business hours, bouncing around on email threads while time-consuming troubleshooting is ongoing, and issues with journal coverage dates not matching holdings in the knowledgebase. Although it is not yet widely adopted, it is likely that the recently published NISO's KBART Automation Recommended Practices, which outlines how to facilitate "the automatic transfer and retrieval of holdings data between content providers and institutional knowledge bases, with the goal of automatically and regularly updating institutional holdings," will answer some problems with knowledgebase coverage date discrepancies (NISO, 2018, p.v). There are still many unanswered frustrations throughout the industry, as anyone who has dealt with discovery and access problems can attest. Acknowledging these problems, Bernhardt and Wickes mutually advocated for all parties to adhere to industry standards and recommendations and foster relationships that will lead to helpful, collaborative communication across the publisher, library, and discovery vendor community.

Reference

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